

Table of Contents

Preface	1
Introduction	1
Purpose	1
Acknowledgements	3
Structure of the Guidebook	4
How to Use this Guidebook	4
Registration Form	7
Change Request Form	9
Project Management Lifecycle	11
Introduction	11
Stakeholder Roles and Responsibilities	14
Chapter 1 - Project Origination	19
Purpose	19
List of Processes	20
List of Roles	22
List of Deliverables	22
1.1 Develop Project Proposal	23
1.2 Evaluate Project Proposals	26
1.3 Select Projects	29
Project Origination End-Of-Phase Checklist	32
Measurements of Success	34
Phase Risks / Ways to Avoid Pitfalls	36
Frequently Asked Questions	39
Chapter 2 – Project Initiation	41
Purpose	41
List of Processes	41
List of Roles	43
List of Deliverables	43
2.1 Initiate the Project	44
2.2 Approve the Project Charter	49
2.3 Conduct Project Kick-Off Meeting	51
Project Initiation End-Of-Phase Checklist	53
Measurements of Success	54
Phase Risks / Ways to Avoid Pitfalls	55
Frequently Asked Questions	61
Chapter 3 – Project Planning	65
Purpose	65
List of Processes	65
List of Roles	67
List of Deliverables	67
3.1 Prepare For Project Planning	69

3.2 Perform Planning Activities and Develop The Project Plan	72
3.3 Confirm Approval to Proceed	103
Project Planning End-Of-Phase Checklist	105
Measurements for Success	109
Phase Risks / Ways to Avoid Pitfalls	111
Frequently Asked Questions	118
Chapter 4 - Project Execution and Control	121
Purpose	121
List of Processes	121
List of Roles	123
List of Deliverables	123
4.1 Launch Project	125
4.2 Manage Project Execution and Control	128
4.3 Gain Project Acceptance	159
Project Execution and Control End-Of-Phase Checklist	160
Measurements of Success	163
Phase Risks/Ways to Avoid Pitfalls	164
Frequently Asked Questions	173
Chapter 5 - Project Closeout	175
Purpose	175
List of Processes	175
List of Roles	177
List of Deliverables	177
5.1 Conduct Post-Implementation Review	178
5.2 Perform Administrative Closeout	182
Project Closeout End-Of-Phase Checklist	185
Measurements of Success	188
Phase Risks/Ways to Avoid Pitfalls	189
Frequently Asked Questions	194
Appendix I – Forms/Templates	197
Template A - Business Case	197
Template B - Proposed Solution	199
Template C – Project Rating Matrix	201
Template D – Proposal Decision Notice	207
Template E - Project Charter	208
Template F – Project Kick-Off Meeting Agenda	211
Template G – Progress Report	213
Template H – Project Status Report	214
Template I – Deliverable Acceptance Form	216
Template J – Change Request Form	217
Template K – Project Acceptance Form	218
Template L – Post-Implementation Survey	219
Template M – Post-Implementation Report	229

Appendix II - Project Plan Template	237
Version Control	238
Executive Summary	239
Introduction	240
Scope Management	242
Time Management	244
Cost Management	246
Quality Management	247
Integrated Change Control	248
Human Resources Management	249
Communications Management	251
Risk Management and Issue Management	252
Procurement Management	254
Project Plan Appendix	255
Project Plan Appendix I – Project Schedule	255
Project Plan Appendix II – Project Budget	255
Project Plan Appendix III – Organizational Chart	255
Project Plan Appendix IV - Team Development Plan(s)	255
Project Plan Appendix V – Work Breakdown Structure (WBS)	256
Project Plan Appendix VI – Change Control Log	257
Project Plan Appendix VII – Risk Management Log	258
Project Plan Appendix VIII – Issue Management Log	259
 Appendix III – Project Management Processes From PMI’s PMBOK	 261
Initiating	261
Planning	261
Executing	267
Controlling	269
Closing	271